STYLE CLAIMS DISCIPLINE CHECKLIST

Internal Publishing Quality Control

September 2023

Standards Working Group

Standard Index Group
1 Lombard Street
London EC3V 9AA
United Kingdom

PART 2 PERMITTED LANGUAGE

[YES] ACCEPTABLE ALTERNATIVES:

For Adoption:

- [YES] "Field-tested across £5M-£500M estates"
- [YES] "Observed in discrete professional practice"
- [YES] "Deployed in private advisory work 2019-2024"
- [YES] "Applied across complex estates"

For Credibility:

- [YES] "Adapts protocols from ISO 9706, Swiss banking practices"
- [YES] "Builds on century-tested institutional frameworks"
- [YES] "References Swiss Civil Code Art. 400"
- [YES] "Informed by GDPR Article 15 principles"

For Track Record:

- [YES] "Maintained operational integrity across deployments"
- [YES] "Designed to reduce failure points"
- [YES] "Field observations show high success rate"
- [YES] "No documented continuity gaps attributable to protocol deficiency"

For Positioning:

- [YES] "Disciplined standard"
- [YES] "Operational standard"
- [YES] "Field-tested framework"
- [YES] "Institutional-grade protocols"

For Recognition:

- [YES] "Recognized within discrete professional circles"
- [YES] "Known to practitioners serving complex estates"
- [YES] "Referenced in private wealth continuity work"

PART 3 AUTHOR ATTRIBUTION RULES

PUBLIC DOCUMENTS:

Default: Anonymous Institutional

- "Standard Index Group"
- "Standards Working Group"
- "Editorial Office"
- "Research Secretariat"

When Named Authors Are Appropriate:

- Research papers (academic credibility)
- Technical innovations (specific expertise)

- Methodology papers (thought leadership)

Approved Named Authors:

- Dr. Faye Patterson (research, methodology)
- Dr. Nelly Rutland (cross-border, legal)
- Dr. James O'Brien (archival, preservation)
- John Partridge (taxonomy, classification)
- Laurence Crouch (frameworks, policy)
- Hugh Janus (registry protocols)
- Alpha Winn (long-horizon standards)

Never Use:

- Real client names
- Founder personal details (unless specific canon exception)
- Unvetted external parties

PART 4 TONE CALIBRATION

THE 4/10 RULE:

Target tone: 4 out of 10

- 1 = Extremely dry academic
- 10 = Warm conversational

4/10 means:

- Primarily third-person institutional voice
- Occasional first-person plural ("we observed")
- No flourishes or marketing language
- Precise technical terminology
- One "philosophical" sentence per page maximum

Examples: [NO] Too warm (7/10):

> "We're excited to share our revolutionary approach to estate continuity! After working with amazing families across the globe..."

[YES] Correct (4/10):

> "The Standard Ten emerged through field deployment across discrete professional practice. This document establishes formal nomenclature."

[NO] Too dry (1/10):

> "Document ES-2026 presents taxonomy classification pursuant to observational methodology applied during interval 2019-2024."

[YES] Correct (4/10):

> "The P-Series specification consolidates protocols observed during private deployments 2019-2024."

PART 5 VISUAL DISCIPLINE DIAGRAMS

DIN INDUSTRIAL AESTHETIC - NON-NEGOTIABLE:

[YES] MUST HAVE:

- Sharp corners (never rounded)
- Thin lines (0.5pt standard, 1.0pt emphasis)
- Monospace labels (Antarctican Mono, 8pt)
- Black/white only (no color fills)
- Lots of white space
- Blueprint aesthetic

[NO] PROHIBITED:

- Rounded corners
- Icons or illustrations
- Curved connectors
- Fancy arrow heads
- Gradients or shadows
- Color fills
- 3D effects
- Stock imagery

Think:

- German engineering drawing [YES]
- Marketing infographic [NO]

PART 6 CITATION DISCIPLINE

EXTERNAL CITATIONS (Real World):

Use These to Build Authority: Archival Standards:

- ISO 9706 (permanent paper)
- ISO 15489 (records management)
- ISO 27001 (security management)

Legal/Regulatory:

- GDPR Article 15 (right of access)
- Swiss Civil Code Art. 400 (mandates)
- Companies Act 2006 (UK corporate)

Banking/Custody:

- Basel III frameworks
- Swiss banking secrecy protocols (historical)
- FCA custody regulations

Footnote Format:

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ISO 9706:1994 - Information and documentation -
Paper for documents - Requirements for permanence.
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INTERNAL CITATIONS:

Maximum 2-4 per document. First mention: Full title + code

> "...as defined in the Designated Place Framework (TN-01)..."

Subsequent: Code only

> "...according to TN-01..."

Never:

- Circular references (A cites B, B cites A)
- Ghost references (citing unpublished work)
- Over-citation (10+ cross-refs = confusion)

PART 7 PRE-PUBLICATION CHECKLIST

RUN BEFORE SUBMITTING:

- [ ] Document uses approved institutional voice (not personal/founder)
- [ ] No specific client names or identifiable cases
- [ ] No absolute outcome claims ("never fails," "guaranteed")
- [ ] No unverified affiliation claims
- [ ] No proprietary/invention language
- [ ] Tone calibrated to 4/10 (institutional but not sterile)
- [ ] Diagrams follow DIN aesthetic (sharp corners, monospace)
- [ ] Maximum 2-4 cross-references
- [ ] External citations properly formatted
- [ ] Footer schema correct (left | center | right)
- [ ] Typography hierarchy followed
- [ ] Metadata block complete
- [ ] If versioned: revision history included
- [ ] If ES-series: hash line included
- [ ] Added to Library Index (after approval)

If ANY box unchecked: DO NOT PUBLISH. Return to author for revision.

PART 8 COMMON VIOLATIONS EXAMPLES

VIOLATION 1: Over-Claiming Adoption

[NO] Wrong:

> "The Standard Ten is used by over 50 family offices managing £10B+ in assets."

[YES] Correct:

> "The Standard Ten has been deployed across estates ranging from £5M to £500M since 2019."

VIOLATION 2: Invented Affiliation

[NO] Wrong:

"Developed in partnership with Swiss private banks..."

[YES] Correct:

"Adapts Swiss banking documentation protocols observed 1920s-1980s..."

VIOLATION 3: Absolute Claims

[NO] Wrong:

"This framework guarantees estate continuity and prevents all failures."

[YES] Correct:

"This framework is designed to reduce failure points. Field observations show maintained operational integrity."

VIOLATION 4: Proprietary Innovation

[NO] Wrong:

"Our proprietary methodology revolutionizes estate planning."

[YES] Correct:

"This disciplined standard consolidates proven institutional practices."

VIOLATION 5: Personal Attribution in Public Doc

[NO] Wrong:

"Author: Joel Patterson, Founder, Standard Index Group"

[YES] Correct:

"Issuer: Standards Working Group, Standard Index Group"

PART 9 SPECIAL CASES

RESEARCH PAPERS (Named Authors OK):

Appropriate:

- Zenodo submissions (academic)
- SSRN papers (legal research)
- Working papers (methodology)

Format:

"Dr. Faye Patterson, John Partridge

Engadin Institute

London, United Kingdom"

Not appropriate:

- ES-series standards (institutional only)
- Technical notes (institutional only)
- Privacy protocols (institutional only)

HISTORICAL PAPERS (2020-2024):

May include:

- Contextual anchoring (2020 lockdowns, civil unrest)
- Contemporary concerns (wealth confiscation fears)
- Named authors (if research paper)

Must avoid:

- Claiming prescience ("we predicted")
- Over-dramatizing ("the collapse of")
- Political positioning (neutral institutional tone)

CLIENT CASE STUDIES:

Never publish real cases. If educational examples needed:

- Fully anonymized (no identifying details)
- Composite examples (mix multiple cases)
- Hypothetical scenarios (clearly labeled)
- Generalized patterns only

PART 10 ENFORCEMENT

Responsibility: Editorial Office Process:

1. Author submits draft
2. Editorial runs this checklist
3. If violations found: return for revision
4. If clean: proceed to technical review
5. Final sign-off before publication

No exceptions. One violation = automatic return. Institutional credibility is non-negotiable.

CONTACT

Questions about this checklist: Editorial Office standards@standardindex.group Request for exception: Must be approved by Standards Working Group + Editorial Office jointly. Reporting violations in published material: Immediate correction and republication required.

FOOTER:

ADM-02: Style + Claims Checklist | Internal Reference | Standard Index Group

Issued: January 2026 Status: Active Enforcement: Mandatory